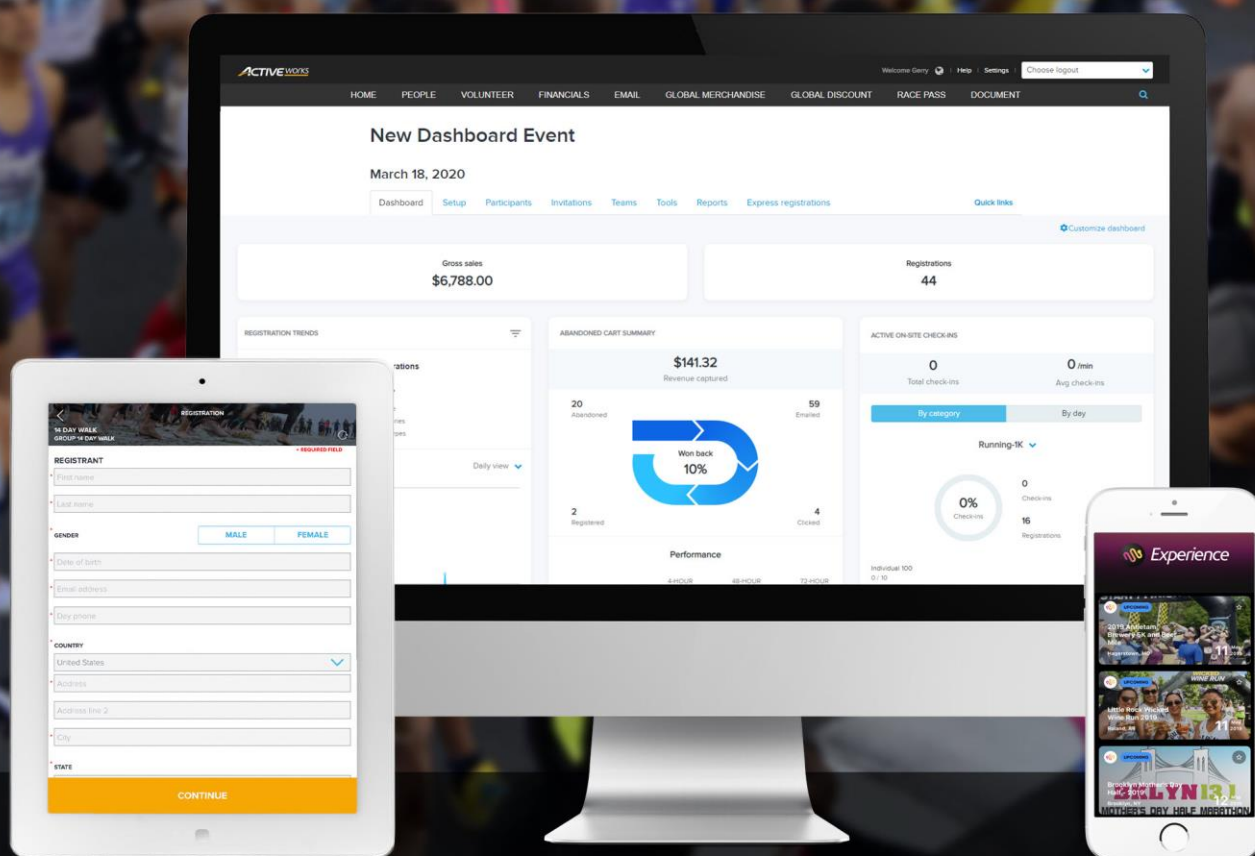




## Product Release Notes for ACTIVEWorks – April 19, 2022



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## People database/Customer Relationship Management (CRM): layout enhancements and new data fields exposed

The **PEOPLE** database/Customer Relationship Management (CRM) feature (a Premium-tier feature) enables you to sort your customers into custom segments according to their personal information, purchase history, event history, email opening rates, referral history and many other data points.

Our last release exposed more information from a customer's record, this release further rearranges their record in the **EVENTS** tab to make it easier for you to manage their orders and to enable quicker navigation to a registration ID and order ID.

New information includes registration **STATUS**, **REGISTRATION #**, **ORDER #**, **PRICE TYPE** and **Merchandise** fulfillment.

Expect further updates in this area soon.

People > Lee Alexander

Lee Alexander Gross revenue Registrations 21

**EVENTS** EMAILS VOLUNTEER RESULTS CREDIT BALANCES

[Add registration](#)

REGISTERED	EVENT	CATEGORIES	REVENUE
3/30/2022	Virtual Fun Run	Running-5K Triathlon-Olympic	\$165.00

### Registrations

STATUS	REGISTRATION #	ORDER #	CHECKED-IN	CATEGORY & PRICE TYPE	REVENUE
Transferred	R-10PT40K61V8	C-76X5HPQYLC7	--	Running-5K - Individual Age group/open	\$10.00
Confirmed	R-10PT40KNJ7L	C-76X5HW5PD57	⊗	Running-5K - Individual Age group/open	\$10.00
Confirmed	R-10PT40KQXG8	C-76X5HWF34R7	✓	Triathlon-Olympic - Individual Age group/open	\$100.00
Cancelled	R-10PT40RNCKY	C-76X5J2X5GYJ	--	Running-5K - Individual Age group/open	\$10.00
Confirmed	R-10PT40KML6L	C-76X5HVPGSTJ	⊗	Running-5K - Individual Age group/open	\$10.00
Transferred	R-10PT40KJNW7	C-76X5HRVFWIW	--	Running-5K - Individual Age group/open	\$10.00
Confirmed	R-10PT40V6Z8X	C-76X5JLD6JTH	✓	Running-5K - Individual Age group/open	\$10.00
TOTAL					\$160.00

### Merchandise

FULFILLED	ITEM	QUANTITY	REVENUE
0 / 7	Included t-shirt - Extra large	7	\$0.00
✓	Insurance - Insurance	1	\$5.00
TOTAL			\$5.00



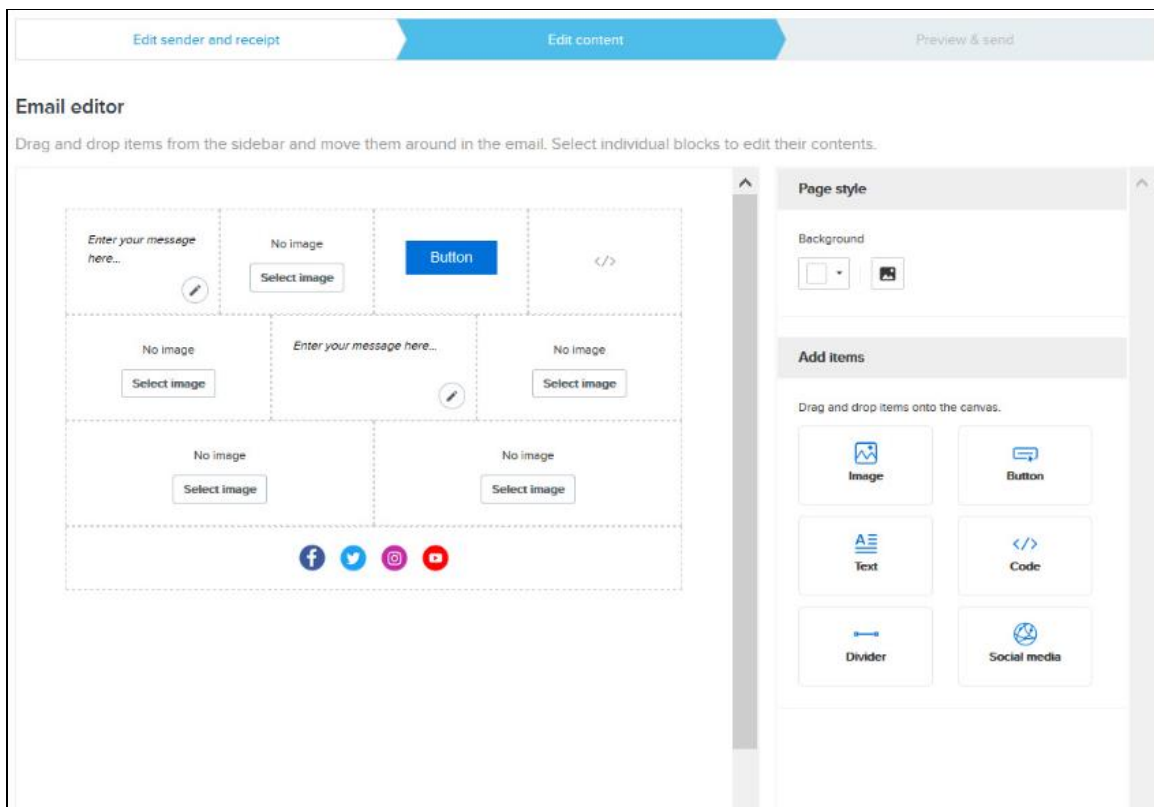
## Email tool upgrade

All users of ACTIVEWorks have now been automatically upgraded (as per the notifications over the last few months) to our most advanced integrated email tool. This platform allows you to deliver highly personalized emails for both marketing and event information. You have complete control to:

- create templates that match your brand.
- create campaigns to automatically send emails based on rules/triggers.
- seamlessly integrate emails with segments of people you create from the database.

All users (Pro,Premium & Elite) can now leverage our fully featured **Email editor**, which allows you to create eye-catching and engaging emails. Review the below wireframes to see how much flexibility you have in your drag and drop design capabilities:

- **Images**
- **Buttons**
- Rich **Text** (with customizable fonts and font sizes, styling, colors, etc.)
- **HTML Code**
- **Dividers**
- **Social media**



For more information about the email editor, see [Email Tool Upgrade](#).



## Revenue report: display custom fee name

Custom Fees are typically used by organizers who want to add a % or fixed fee amount to a specific item in the registration form e.g., sales tax item, or a blanket flat fee if someone adds a specific merchandise item.

Previously, the custom fee name in the **FINANCIALS > Revenue report > Download > Ledger entries** report was not displayed. Now, you can see the custom fee name in the revenue report's **Ledger description** column.

Example:

You are using the following custom fees for different purposes:

Dashboard

Setup

Participants

Invitations

Teams

Tools

Reports

Express registrations

Virtual race

Custom fees

Customize charges of additional taxes or surcharges you need to collect from participants.

Create

Delete

FEE NAME	AMOUNT	REGISTRATION TYPES	MERCHANDISE
<div><div><input type="checkbox"/></div><div>Sales Tax</div></div>	10.00 %	Running-5K Running-8K Running-1K Running-10K ...	Included t-shirt Sports bag Pants
<div>Show all</div>			
<div><div><input type="checkbox"/></div><div>Bag Drop</div></div>	\$2.00	Running-5K Running-8K Running-1K Running-10K ...	Included t-shirt Sports bag Pants
<div>Show all</div>			

Previously:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA
Participant full name	Price type	Registration	Description	Registration id	Registration	Order id	Transaction type	Payment	Product type	Product name	Unit price	Quantity	Order am	Remittance	Ledger description											
Individual1 Running-1K	Individual1 Running-1K	Registration: Running-1K - Individual1	Registration: Running-1K - Individual1	R-10PT427Q7F9	Admin	C-76XSR4G401Z	Purchase	Cred APP9	REGISTRATION	scfTest - Running-1K	15	1	15	0	0											
Individual1 Running-1K	Individual1 Running-1K	Registration: Running-1K - Individual1	Registration: Running-1K - Individual1	R-10PT427Q7F9	Admin	C-76XSR4G401Z	Custom Fee	Cred APP9	REGISTRATION	scfTest - Running-1K	6	1	6	0	0											
Individual1 Running-1K	Individual1 Running-1K	Registration: Running-1K - Individual1	Registration: Running-1K - Individual1	R-10PT427Q7F9	Admin	C-76XSR4G401Z	Custom Fee	Cred APP9	REGISTRATION	scfTest - Running-1K	30	1	30	0	0											
Individual1 Running-1K	Individual1 Running-1K	Registration: Running-1K - Individual1	Registration: Running-1K - Individual1	R-10PT427Q7F9	Admin	C-76XSR4G401Z	Processing fees	Cred APP9	REGISTRATION	scfTest - Running-1K	-20.4	1	-20.4	-20.4	0											
Individual1 Running-1K	Individual1 Running-1K	Included t-shirt - Large	Included t-shirt - Large	R-10PT427Q7F9	Admin	C-76XSR4G401Z	Purchase	Cred APP9	ADDON	Large	40	1	40	0	0											
Individual1 Running-1K	Individual1 Running-1K	Included t-shirt - Large	Included t-shirt - Large	R-10PT427Q7F9	Admin	C-76XSR4G401Z	Custom Fee	Cred APP9	ADDON	Large	16	1	16	0	0											
Individual1 Running-1K	Individual1 Running-1K	Included t-shirt - Large	Included t-shirt - Large	R-10PT427Q7F9	Admin	C-76XSR4G401Z	Custom Fee	Cred APP9	ADDON	Large	30	1	30	0	0											
Individual1 Running-1K	Individual1 Running-1K	Included t-shirt - Large	Included t-shirt - Large	R-10PT427Q7F9	Admin	C-76XSR4G401Z	Processing fees	Cred APP9	ADDON	Large	-8.6	1	-8.6	-8.6	0											
										Agency Absorbed Product Processing Fee																

Now:

Participant full name	Price type	Registration	Description	Registration id	Registration	Order id	Transaction type	Payment	Product type	Product name	Unit price	Quantity	Order am	Remittance	Ledger description
Individual1 Running-1K	Individual1 Running-1K	Registration: Running-1K - Individual1	Registration: Running-1K - Individual1	R-10PT427Q7F9	Admin	C-76XSR4G401Z	Purchase	Cred APP9	REGISTRATION	scfTest - Running-1K	15	1	15	0	0
Individual1 Running-1K	Individual1 Running-1K	Registration: Running-1K - Individual1	Registration: Running-1K - Individual1	R-10PT427Q7F9	Admin	C-76XSR4G401Z	Custom Fee	Cred APP9	REGISTRATION	scfTest - Running-1K	6	1	6	0	Sales Tax
Individual1 Running-1K	Individual1 Running-1K	Registration: Running-1K - Individual1	Registration: Running-1K - Individual1	R-10PT427Q7F9	Admin	C-76XSR4G401Z	Custom Fee	Cred APP9	REGISTRATION	scfTest - Running-1K	30	1	30	0	Bag Drop
Individual1 Running-1K	Individual1 Running-1K	Registration: Running-1K - Individual1	Registration: Running-1K - Individual1	R-10PT427Q7F9	Admin	C-76XSR4G401Z	Processing fees	Cred APP9	REGISTRATION	scfTest - Running-1K	-20.4	1	-20.4	-20.4	Agency Absorbed Product Processing Fee
Individual1 Running-1K	Individual1 Running-1K	Included t-shirt - Large	Included t-shirt - Large	R-10PT427Q7F9	Admin	C-76XSR4G401Z	Purchase	Cred APP9	ADDON	Large	40	1	40	0	0
Individual1 Running-1K	Individual1 Running-1K	Included t-shirt - Large	Included t-shirt - Large	R-10PT427Q7F9	Admin	C-76XSR4G401Z	Custom Fee	Cred APP9	ADDON	Large	16	1	16	0	Sales Tax
Individual1 Running-1K	Individual1 Running-1K	Included t-shirt - Large	Included t-shirt - Large	R-10PT427Q7F9	Admin	C-76XSR4G401Z	Custom Fee	Cred APP9	ADDON	Large	30	1	30	0	Bag Drop
Individual1 Running-1K	Individual1 Running-1K	Included t-shirt - Large	Included t-shirt - Large	R-10PT427Q7F9	Admin	C-76XSR4G401Z	Processing fees	Cred APP9	ADDON	Large	-8.6	1	-8.6	-8.6	Agency Absorbed Product Processing Fee



## Credit balance report: new “Is Cash-out” and “Active ID/Agency ID” columns

The **FINANCIALS > Credit balance report** now has two new columns:

- **Is Cash-out**
- **ActiveID/AgencyID**

First name	Last name	Email	Credit balance used/received	Currency	Transaction date	Agency payment account	Order number	Registration number	Event number	Event name	Is Cash-out	ActiveID/AgencyID
Anila			48.6	GBP	12/10/2021	Sports	C-7	94VX	E-00V0NSPY	Run for fun	FALSE	AgencyID
Anila			0	GBP	12/10/2021	Sports	C-7	94VX	E-00V0NSPY	Run for fun	FALSE	AgencyID
Anila			8.64	GBP	12/10/2021	Sports	C-7	94VX	E-00V0NSPY	Run for fun	FALSE	AgencyID
Anila			-48.64	GBP	1/12/2022	Sports					TRUE	AgencyID
Anila			-8.64	GBP	1/12/2022	Sports					TRUE	AgencyID

This image shows the credit balance ledger of all transactions for Anila.

### Is Cash-out column

On 12/10/2021, three transaction lines (GBP 48.6, GBP 0 and GBP 8.64) have been added to the credit balance report. These lines relate directly to the original event Anila registered for and what she purchased in that registration (hence the 0 for a free T-shirt) and matches exactly with the refund lines in the revenue report which have been cashed into the credit balance report.

On 1/12/2022, the organizer refunded the cash in the credit balance account to Anila’s original payment method (e.g., debit/credit card)

- This is recorded as **TRUE** in the **Is Cash-out** column.
- This means that you are returning cash to the customer from the credit balance account.
- This cash is deducted from your organization’s account to fund the transaction.

**Note:** Cash-out transactions do not appear in the revenue report because they are not associated with a revenue event and are purely cash transactions.

If your revenue report says you will be remitted GBP 10,000 in that period, but your statement says you will receive GBP 9,850, then please check if there are GBP 150 of cash-out transactions in that period in the credit balance report (we will shortly upgrade the statements to reflect these cash-out scenarios, so they are easier to understand).

### ActiveID/AgencyID column

We have added this **ActiveID/AgencyID** column to ensure that you can see all your credit balance transactions and can identify customers such as Adam (below) and send the appropriate communication so that who have received credits can use them for their next registration.

**Technical Explanation:** An Active.com account is split into two tiers: parent and child:

- Active ID is our enterprise “parent” ID that covers Adam worldwide and allows him to register for events no matter who the event organizer is with one simple sign-in using Active.
- Agency ID is the “child” ID where Adam has a profile to manage his tickets with each individual organizer.

The above IDs are all managed by Active and Adam just has ONE account with Active.com.





**Practical Explanation:** Adam might register for both Ironman and Tough Mudder events using his Active.com sign-in (Active ID), both organizers are completely independent companies but using ACTIVEWorks Endurance to power their events and thus each registration of Adam is linked to both the Active ID (parent) and unique Agency ID (child); one Agency ID for Tough Mudder and one Agency ID for Ironman.

**Example below:** Adam has credit balance from a refund of an event called “marathon” (with a label **ActiveID**), which simply means he (as a purchaser) registered for somebody else into the “marathon” event. Adam has a credit to spend due to this refund. Although he has NOT linked his Active.com account with your organization, he is still able to see and use his credit balance by signing into MyEvents page for his next registration.

First name	Last name	Email	Credit balance used/received	Currency	Transaction date	Agency payment account	Order number	Registration number	Event number	Event name	Is Cash-out	ActiveID/AgencyID
Adam	Defolo		43.2	GBP	12/10/2021						FALSE	ActiveID

## USAT agreement and waiver update

The USA Triathlon (USAT) membership agreement and waiver has been updated to the latest version:

SELECT CATEGORY


COMPLETE FORM

CHECKOUT

### Registration

USAT SANCTIONING

This event requires a USAT membership. Select one of the following options, and then review the terms and conditions in the USAT membership agreement and waiver below



☐ Enter your USAT membership number:

Purchase:

☐ Youth and Junior (age: < 18): \$10.00

☐ 1-Year Adult Annual Membership (age: 24+): \$50.00

☐ Event License (One-day) (age: 18+): \$15.00

☐ Young Adult Annual Membership (age: 18-23): \$36.00

☐ Premium Adult Annual Membership (age: 24+): \$199.00

USAT membership agreement and waiver [Print](#)

**WARNING: READ CAREFULLY. THIS AGREEMENT INCLUDES A RELEASE OF LIABILITY AND WAIVER OF LEGAL RIGHTS AND DEPRIVES YOU OF THE RIGHT TO SUE USA TRIATHLON AND OTHER PARTIES. DO NOT SIGN THIS AGREEMENT UNLESS YOU HAVE READ IT IN ITS ENTIRETY. SEEK THE ADVICE OF LEGAL COUNSEL IF YOU ARE UNSURE OF ITS EFFECT.**

**WAIVER AND RELEASE OF LIABILITY,  
ASSUMPTION OF RISK AND INDEMNITY AGREEMENT**

IN CONSIDERATION OF USA Triathlon ("USAT") allowing me to participate in any USAT sanctioned event (the "Event" or "Events"), I, for myself, and on behalf of my spouse, children, parents, guardians, heirs and next of kin, and any legal and personal representatives, executors, administrators, successors and assigns, hereby agree to and make the following contractual representations pursuant to this Waiver and Release of Liability, Assumption of Risk and Indemnity Agreement (this "Agreement").

☐ I have read and agree to the **USAT Membership Agreement and Waiver**

**Electronic signature**



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## **About ACTIVE Network, LLC**

ACTIVE Network, LLC is a technology and media company that helps millions of people find and register for things to do and helps organizations increase participation in their activities and events.

For more information about ACTIVE Network, LLC products and services, please visit [ACTIVEnetwork.com](https://ACTIVEnetwork.com).

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